

# **Spouse Influence in Army Organizational Change**

**A Monograph  
by  
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## **Abstract**

SPOUSE INFLUENCE IN ORGANIZATIONAL CHANGE by Major Dominick L. Edwards,  
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Commanders and other leaders in the Army must constantly consider how their organization is changing and how it must change to remain relevant and effective in its combat roles. When planning and conducting an organizational change, these commanders must create readiness for the change (RFC). The Armenakis and Harris revisions to the Lewin organizational change model describe the need for a leader to create RFC through a five-domain change message that includes the domains of discrepancy, efficacy, personal valence, principal support, and appropriateness. While all of the domains are important, this study will focus on that of principal support, which requires that many people in the organization such as both formal and informal leaders must demonstrate their support for the change through their words and actions. Specifically, the study examines the principal support role that Army spouses play in organizational change efforts.

While there is increasing discussion of family in contemporary literature, most of this discussion focuses either on how family problems affect worker productivity or on how companies can offer benefits that will make a worker's family life easier. Recent evidence indicates that Army leadership has recognized this phenomenon through actions such as creating the Army Family Covenant and by renewing emphasis on family programs to help increase commitment from soldiers. Army leaders are taking measures to ensure soldiers' families are well-cared for, especially as soldiers spend more time away from home. Despite this recognition of how important family life is to employees and soldiers, there is little research into how spouses influence the organization. Similarly, there is far less evidence of direct and deliberate measures to educate spouses about changes that are occurring in the Army in an effort to generate principal support for the changes.

The concept of margin in life (MIL), a model used in adult learning is also useful when considering individual RFC. MIL indicates how much energy an individual has available for new learning and for changing behaviors as factors such as family life place either loads on the individual or generate power for the individual. The primary assertion in this monograph is that spouses who support organizational changes contribute to a soldier's power and increase his or her MIL and thus generate higher soldier RFC. By considering spouses as useful agents of principal support and communicating the change message to these spouses, commanders can increase RFC and thus improve the effectiveness of their units.

Through survey research to determine respondent MIL and RFC, the study reached several conclusions. First, there was no direct correlation between the surveyed population's MIL and increased RFC. However, this finding is similar to other studies of high-MIL individuals that link MIL and RFC. These findings indicate that there is more research necessary in the field of MIL and its connection to RFC

Most significantly, the study found a strong correlation between spouse support for an organizational change and whether or not the soldier supported the change. Finally, the study identified some of the communication methods that Army leaders used to generate support for organizational change from the spouses. The overall conclusion is that Army leaders should communicate their change message to spouses to increase soldier RFC and to increase the likelihood of conducting successful organizational change.

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## Introduction

“To the extent that the military views the family as an outside influence with which it competes, the more resistant service members and their families will be to the demands of the organization.”<sup>1</sup>

Change is one of the constant factors in Army life and is critical to maintaining warfighting effectiveness. As leaders assume new assignments, they make changes to their organizations that are related to inevitable variances in personnel, requirements, and operational conditions. Astute Army commanders recognize that their arrival will naturally create changes in their organizations and some of them deliberately manage that change process. Some rely on instinct and often implement successful change. Others are unaware of the impact they have on their organization and they do not manage change, but simply assume that what they want will occur. The worst case in these situations is that the unit may respond simply out of fear or compliance, which creates an unhealthy unit culture. In all cases, Army leaders should strive to effectively communicate their change message.

Research suggests that one of the most effective ways to create readiness for organizational change is for the organization's leader to effectively communicate his change message to the organization. Armenakis and Harris assert that there are five domains of the change message that leaders should use.<sup>2</sup> The domains are discrepancy, appropriateness, principal support, efficacy, and valence.<sup>3</sup> Principal support<sup>4</sup> is relevant to this study and requires the

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<sup>1</sup> Mady Wechsler Segal, "The Nature of Work and Family Linkages: A Theoretical Perspective," in *The Organization Family: Work and Family Linkages in the U.S. Military*, ed. Gary L Bowen and Dennis K. and Orthner (New York: Praeger, 1989), 30.

<sup>2</sup> Achilles A. Armenakis and Stanley G. Harris, "Crafting a Change Message to Create Transformational Readiness," *Journal of Organizational Change Management*, 15, no. 2 (2002): 169-183.

<sup>3</sup> Armenakis and Harris define discrepancy as the means through which people in an organization recognize that there is a need for change. Discrepancy can be driven either by internal or external factors, but these factors must clearly identify to members of an organization that their status quo is unacceptable and they need to make changes to reach a different desired endstate. Appropriateness is the ability for people to recognize that the proposed change is the right change; in effect they must believe that a change

change agent to identify key people in the organization and influence them to support the change effort through their actions and their words. Despite the widespread acceptance of this model, there is one significant shortcoming. Although organizations are seen as existing and functioning in an open system, Armenakis and Harris do not consider communicating the change message to potential influencers who are outside the organization, such as family members.

There is a growing field of research on how families affect workers' performance and work attitudes. Much of this research focuses on conflicts between work and family and offers suggestions on how organizations can reduce this conflict to improve worker productivity and retention. Most contemporary Army literature on family support and existing family programs seem focused on this view of families and is exemplified in common statements such as "Recruit the soldier, retain the family." However, there is new business research that studies the positive effects on work performance derived from employee participation in multiple domains, particularly when one is involved with both work and family.<sup>5</sup> Army leadership should consider families and spouses<sup>6</sup> from this perspective.

The linkage between these concepts of creating readiness for change (RFC) and how organizations view work-family relationships is found in the theory of margin. This theory is a model of adult learning which proposes that adults must have a proper ratio of power, or sources

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will make them better and that it will fix the cause of the problems in the organization. Efficacy is the belief that the organization can make the change and this belief is strongly rooted in the people's confidence in their ability to successfully change. Valence is the perceived reward for changing. Simply put, people in an organization must understand that they will gain something through the change process. Valence answers the question, "What's in it for me?" from the perspective of all who are impacted by the proposed change.

<sup>4</sup>Principal support requires that key leaders in the organization, both formal and informal, demonstrate behaviors that support the change.

<sup>5</sup> Joseph G. Grzywacz, Dawn S. Carlson, K. Michele Kacmar, and Julie Holliday Wayne, "A Multi-level Perspective on the Synergies Between Work and Family," *Journal of Occupational and Organizational Psychology* 80 (2007): 559-574.

<sup>6</sup> Throughout this study, all references used to demonstrate relationships between family members will use either the term "soldier," which indicates either the individual serving in the military, or "spouse," which refers either to the individual married to a soldier. The spouse can be male or female and may or may not also be a member of the military.



of strength, and load, or factors that require the expenditure of an individual's energy. If an adult has more power than load, he is said to have margin and is capable of learning. Adults with more load than power are not receptive to learning.<sup>7</sup> Margin in life (MIL) is a component of the theory that one can use to determine an individual's RFC. Studies using MIL also suggest a positive correlation between social relationships and power.<sup>8</sup> This leads one to propose that a family's support for a soldier can increase his MIL, thus creating favorable conditions for his or her RFC. If this is true, then Army leaders should deliberately communicate their change message to spouses to gain their support for organizational change.

This research will help determine if Army spouses are significant sources of principal support who can assist leaders in creating RFC in their organizations. Research is based on a survey questionnaire to determine how Army leaders communicate their change message and how effective these techniques are from the perspective of their subordinates and of their subordinates' spouses. Additionally, the survey will measure the respondents' MIL to determine how spouses can influence soldiers during organizational changes. In addition to the survey data collected, this study will analyze additional historical evidence about the role of Army spouses. This evidence should offer additional insight into the nature and extent of support that military spouses provide for their soldiers and will provide some depth and enlightenment to the survey data.

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<sup>7</sup> Howard Y. McClusky, "A Differential Psychology of the Adult Potential," in *The Adult Learner: A Neglected Species*, ed. Malcolm S. Knowles, 4th ed. (Houston: Gulf Publishing Company, 1990), 149-150.

<sup>8</sup> Chutima Hanpachern, George A. Morgan, and Orlando V. Griego, "An Extension of the Theory of Margin: A Framework for Assessing Readiness for Organizational Change," *Human Resource Development Quarterly* 9, no. 4 (Winter 1998): 339-350.

## **Literature Review**

A brief review of prominent organizational change theory is the starting point to determine how Army spouses contribute to soldier RFC. Most critical to these theories is the shared views on overcoming organizational resistance to change and on achieving individual RFC by using the message domain of principal support. The next step is to establish the role of the spouse in military families by examining the family-work linkage to determine the existence of work-family spillover and to consider its positive and negative aspects. If there is evidence of such spillover, then determining how the Army formally addresses families through formal programs and public statements becomes important. Coupled with this is the necessity to understand why the Army considers its families important to the organization. Finally, the greatest challenge is to tie the theoretical work together and to determine a method to quantify spousal principal support in organizational change efforts and if that role influences soldier RFC.

Army commanders with limited time for personal study and education on organizational change may look to Army doctrine and institutional training to provide the answers they need to effectively transform their units. However, there is currently no discussion of how to lead change in Army doctrine. Additionally, these leaders cannot solely rely on information gained in professional military education courses since there is only one two-hour block of Intermediate Level Education instruction on organizational change in the Command and General Staff College. These facts require Army commanders and supervisors either to rely on their instincts or to study outside sources to effectively lead change in their units.

When seeking external sources on organizational change, Army leaders often study and adopt business models to aid their military change efforts. While there are many such models to choose from, most are based upon Kurt Lewin's 1947 field theory in which he asserts that

organizations are constantly influenced by forces that both require and resist change.<sup>9</sup> When these forces are in equilibrium, the organization remains stable. To effect change, a leader must challenge the state of equilibrium to overcome the resistant forces. Lewin's field theory model states that there are three distinct steps in organizational change – unfreezing, movement, and refreezing.<sup>10</sup>

In Lewin's unfreezing phase, leaders prepare workers for the change and overcome any individual and organizational resistance to change. Since field theory's introduction in 1947, many researchers have explored this concept of unfreezing and how to best overcome individual and organizational resistance. Critical to the success of the unfreezing phase is the leader's ability to overcome resistance to change and convince people in the organization to act in accordance with the new ways.<sup>11</sup> Most major organizational change theories recognize the critical importance of creating RFC although they take different approaches to solving the problem (Figure 1).

When considering different organizational change models, the amount of emphasis placed on creating RFC indicates that many authors consider readiness to be both critical and difficult to generate. Consider the Kotter model in which six of the eight steps have a role in this phase.<sup>12</sup> In the model that Jim Collins describes, five of his seven steps assist in creating RFC.<sup>13</sup> Armenakis and Harris consider creating RFC to be critical and spend a large portion of their work

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<sup>9</sup> Kurt Lewin, "Frontiers in Group Dynamics: Concept, Method and Reality in Social Science; Social Equilibria and Social Change" *Human Relations* 1, no. 1 (1947): 5-41.

<sup>10</sup> Kurt Lewin, "Frontiers in Group Dynamics: Concept, Method and Reality in Social Science; Social Equilibria and Social Change," 35.

<sup>11</sup> John M. Ivancevich, and Michael T. Matteson, *Organizational Behavior and Management* (New York: McGraw-Hill, 2002), 628.

<sup>12</sup> The eight steps of John Kotter's change model are Establish a Sense of Urgency, Create the Guiding Coalition, Develop the Vision and Strategy, Communicate the Change Vision, Empower Employees for Broad-Based Action, Generate Short-Term Wins, Consolidate Gains and Produce More Change, and Anchor New Approaches in the Culture.

<sup>13</sup> The steps outlined in Jim Collins' book *Good to Great* are First Who...Then What, Confront the Brutal Facts, The Hedgehog Concept, A Culture of Discipline, Technology Accelerators, The Flywheel and the Doom Loop, From Good to Great to Built to Last.

describing how to create it.

Specifically, Armenakis and Harris have determined that an important way to create RFC is to properly construct and use a change message to shape individual feelings. They assert that a leader's proper communication helps reduce individual and collective resistance to change.

Armenakis and Harris identify five domains of the message that make it effective at addressing resistance to change— discrepancy, efficacy, personal valence, principal support, and appropriateness.<sup>14</sup>

Comparison of Four Change Models			
Lewin Change Model	Armenakis Revisions to the Lewin Model	Kotter Change Model	Collins Change Model
Unfreezing	Create readiness for change through a change message composed of the following elements: Discrepancy Appropriateness Principal support Efficacy Valence	Establish a Sense of Urgency Create the Guiding Coalition Develop the Vision and Strategy Communicate the Change Vision	First Who...Then What Confront the Brutal Facts The Hedgehog Concept A Culture of Discipline
	Implement change strategies into the organization supported by the message: Active Participation	Empower Employees for Broad-Based Action Generate Short-Term Wins	Technology Accelerators
Movement	Persuasive Communication Management of internal and external information Formalization Activities	Consolidate Gains and Produce More Change	The Flywheel and the Doom Loop
Refreezing	Rites and Ceremonies Diffusion Practices HRM Practices	Anchor New Approaches in the Culture	From Good to Great to Built to Last

**Figure 1: A Comparison of Organizational Change Models. Several prominent models are compared to one another by using the Lewin Model as the standard. Steps listed in gray can take place in one or more steps of Lewin's process as indicated.**

The Armenakis and Harris model is significant to this study for several reasons. First, the model is widely cited in scholarly literature. Second, it is a simple, effective model that has withstood testing against real-world scenarios, including some military examples. Finally, this

<sup>14</sup> Armenakis and Harris, "Crafting a Change Message to Create Transformational Readiness," 170.

model allows that the leader will have to communicate the change message throughout the process – from the beginning through the adoption phase. The model describes an action, effective leader communication, which is necessary throughout the process. This is in contrast to other models that are sequential and do not clearly acknowledge the presence of elements that must exist in all phases of the transformation process.

Of the five domains of the change message, the domain of principal support holds the greatest importance to this study. According to Armenakis and Harris, principal support requires that change agents actively demonstrate their support for the change through their words and actions. As part of this, the leader recruits other leaders throughout the organization to demonstrate their support for the new change. The personal example of these leaders and key members of the organization will generate support from other organizational members and the change message will continue to filter throughout the organization.

This idea of principal support is present in other change models as well. John Kotter has a step that requires creating a guiding coalition for the transformation. The members of this guiding coalition should be well-respected formal and informal leaders<sup>15</sup> who possess sufficient leadership skills to spread the message throughout the organization.<sup>16</sup> In another example of his understanding of principal support, Kotter states that “Leadership by example and living the vision are the most important means of communication for the change.”<sup>17</sup> In Kotter’s step, “Communicate the change vision,” he recognizes the key to success is to “get as many people as possible acting to make the vision a reality”<sup>18</sup> through their words and deeds.<sup>19</sup> Kotter is not alone

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<sup>15</sup> John P. Kotter, *Leading Change* (Boston: Harvard Business School Press, 1996), 6.

<sup>16</sup> John P. Kotter, and Dan S. Cohen, *The Heart of Change: Real-Life Stories of How People Change Their Organization*. (Boston: Harvard Business School Press, 2002) 46.

<sup>17</sup> Kotter, *Leading Change*, 95-96.

<sup>18</sup> Kotter and Cohen, *The Heart of Change: Real-Life Stories of How People Change Their Organizations*, 83.

<sup>19</sup> Kotter, *Leading Change*, 9-10.

in recognizing that people acting in accordance with the message is one of the most effective ways of communicating it to others.

In *Good to Great*, Jim Collins describes the importance of generating principal support for an organizational change, although, like Kotter, he does not use the term. In Collins' first step, "first who...then what," Collins notes that all of the successful transformations in his study began with an effort to recruit the right people while simultaneously moving or firing the wrong people. He states that this occurs even before determining the exact nature of the change.<sup>20</sup> In fact, Collins adds that reward systems in successful businesses were amended to keep the right people on the team rather than to attempt to correct undesired behaviors from the wrong people.<sup>21</sup> However, one must remember that this tactic is suitable in many business applications, but may be difficult in other settings, such as in government or union jobs. Collins also notes that the key to successful transformations is to have a core of people who are committed to the change effort and who display the discipline to adhere to the message regardless of how brutal the facts of their situation may be.<sup>22</sup> Finally, in the step "a culture of discipline," Collins notes that the key requirement for successful change is to have disciplined people who possess disciplined thought and action.<sup>23</sup> This discipline must support the organization's transformation and is the embodiment of Armenakis' concept of principal support.

All of the change models studied recognize the importance of generating principal support as a key means to overcoming organizational resistance. Each theorist correctly notes that for a change effort to be effective, influential people within the organization must demonstrate

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<sup>20</sup> Jim Collins, *Good to Great: Why Some Companies Make the Leap...and Others Don't* (New York: Harper Collins Publishers Inc, 2001), 41.

<sup>21</sup> Collins *Good to Great*, 50.

<sup>22</sup> Collins *Good to Great*, 81,92.

<sup>23</sup> Collins *Good to Great*, 126.

their support.<sup>24</sup> However, in doing so, they only consider the importance of generating principal support from within the organization. Only Armenakis and Harris note the existence of external forces that can affect individual RFC. They also acknowledge the importance of an individual's social relationships. However, their work does not adequately explore these two important concepts of external influences and social relationships.<sup>25</sup> Because of this, studying the impact that family members have on soldiers and how they influence his or her RFC is important.

One of the most important social relationships that influences many employees' attitudes about work is the one between the employee and his or her spouse, yet there has only been limited research into the work-spouse relationship. Similarly, there is very little study on how family members can assist leaders in furthering organizational goals and assisting with change efforts. Most contemporary studies consider employee-family relationships from a limited perspective. A large body of this research focuses on how conflicts between the job and family affect employees' work performance. These studies tend to report how family problems affect an employee's work performance and how businesses can offer incentives that address family concerns to make workers more productive. Despite broad recognition of the key role that spouses play in Army life, most Army studies and family programs are similar to those in business and overlook the potential role that soldiers' families can play in furthering organizational goals.

In business and psychological literature, there is a large body of work addressing the nature of personal conflicts that arise from employees having different roles. Much of the literature supports a theory that workers are seen as having a limited amount of energy and participation in activities outside of work necessarily detracts from work performance by creating

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<sup>24</sup> Armenakis and Harris, "Crafting a Change Message to Create Transformational Readiness," 170.

<sup>25</sup> Achilles A. Armenakis, Stanley G. Harris, Kevin W. Mossholder, "Creating Readiness for Organizational Change" *Human Relations* 46, no.6 (June 1993): 681-705.

conflicts between work and family that only negatively affect the work environment.<sup>26</sup> When this energy is divided between work and the family, the result is “work-family conflict” which is defined as the “tensions, challenges, and struggles individuals may perceive or feel related to their expectations, duties or requirements, and behaviors in, for, and between each role (work and family).”<sup>27</sup>

Historically, employers have chosen two different methods of dealing with work-family conflict. The first method required building a wall between work and all other activities by keeping work and non-work activities completely separate. The other method required employers to adopt a paternalistic view by assuming some responsibility for and then providing some employee non-work requirements. After recognizing flaws in both methods, employers arrived at a third option, which involved demonstrating a recognition and respect for employees’ differing roles while allowing the employee to fully care for the needs of his or her non-work responsibilities and needs.<sup>28</sup> Subsequent research supported this third method because findings indicated that employers who demonstrated high levels of respect for employee’s non-work roles generated greater commitments toward the work role.<sup>29</sup>

This indication that employers have some role in reducing work-family conflict is evident in other literature. These studies also point out the benefits that employers can expect to gain for their efforts. One way to reduce work-family conflict is for the organization to encourage balance between their employee’s work and family roles. Studies show that organizations that do not

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<sup>26</sup> Aaron Cohen and Catherine Kirchmeyer, "A Cross-Cultural Study of Work/Nonwork Interface Among Israeli Nurses," *Applied Psychology* 54, no. 4 (2005): 538.

<sup>27</sup> Susan R. Madsen, Cameron R. John, and Duane Miller, "Work-Family Conflict and Health: A Study of Workplace, Psychological, and Behavioral Correlates," *The Journal of Behavioral and Applied Management* 6, no. 3 (May 2005): 225.

<sup>28</sup> Catherine Kirchmeyer, "Managing the Work-Nonwork Boundary: An Assessment of Organizational Responses," *Human Relations* 48, no. 5 (May 1995): 516-518.

<sup>29</sup> Aaron Cohen, "An Examination of the Relationships Between Work Commitment and Nonwork Domains," *Human Relations* 48, no. 3 (March 1995): 243-244.



encourage balance increase their employees' levels of stress which leads to reduced productivity and creativity at work. Additionally, organizations that do not take measures to reduce work-family conflict can expect employee "absenteeism, tardiness, turnover, low job commitment, low job involvement, overall performance, and reduced organizational citizenship, which, in turn, reduced overall work performance."<sup>30</sup> Finally, one study notes there is a relationship between reduc[ed] work-family conflict and an improvement in employees' physical and mental health.<sup>31</sup> Given these considerations, existing literature clearly indicates there is a presence of work-family conflict and that organizations can benefit by taking actions to reduce the conflict. However, this view of the work-family relationship indicates a bias that businesses should only manage conflict because it makes them more efficient. The next point to consider is how the family can actually help the organization through its positive contributions to the employee and, by extension, to the organization.

A recent development in the study of the work-family relationship began in 2002 when scholars began looking for a positive relationship between work and the family.<sup>32</sup> In 2006, Greenhaus and Powell contributed to this recognized need by introducing their concept of work-family enrichment.<sup>33</sup> They propose that experiences in one role, such as the family, can enrich experiences in other roles, such as work. Greenhaus and Powell suggest that there is little knowledge in this area because most researchers have not asked questions that would indicate such enrichment. To correct this oversight, they challenge other researchers to deliberately study

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<sup>30</sup> Susan R. Madsen, Cameron R. John, and Duane Miller, "Work-Family Conflict and Health: A Study of Workplace, Psychological, and Behavioral Correlates," 226.

<sup>31</sup> Susan R. Madsen, Cameron R. John, and Duane Miller, "Work-Family Conflict and Health: A Study of Workplace, Psychological, and Behavioral Correlates," 239.

<sup>32</sup> Joseph G. Grzywacz, Dawn S. Carlson, K. Michele Kacmar, and Julie Holliday Wayne, "A Multi-level Perspective on the Synergies Between Work and Family," 559.

<sup>33</sup> Jeffrey H. Greenhaus and Gary N. Powell, "When Work and Family are Allies: A Theory of Work-Family Enrichment," *Academy of Management Review* 31, no. 1 (2006): 72-92.

the concept of work-family enrichment in different settings.<sup>34</sup> One significant aspect of this study is the proposition that the family to work enrichment is stronger than the work to family enrichment.<sup>35</sup> This suggests that there is positive influence from the family domain that affects an employee's work attitudes and performance. Is there a similar effect among U.S. Army soldiers?

Although studies of Army families tend to focus on adaptation to the unique military lifestyle, one can glean information about family enrichment from them. Russo's 1999 study defines military family adaptation as "the ability of a family to adjust to the organizational demands"<sup>36</sup> of the Army. This study focused largely on how the families' adaptation to the military lifestyle and military needs related to organizational outcomes such as soldiers' work effectiveness, preparation and retention. She indicates there are two different types of adaptation that must occur in military families. The first is internal adaptation which relates to how family members adapt to and cope with the military within their family. In other words, how does the family change the way it does things because of the Army's demands? The second type of necessary adaptation is external adaptation, which relates to how families adapt to and cope with the Army and its needs. This considers how the family adapts in ways that are beneficial to the Army and its mission. This study states that high degrees of external adaptation to Army life have a positive influence on a soldier's readiness, work satisfaction, and retention.<sup>37</sup> Russo specifically notes that poor family adaptation has a negative effect and creates problems for the soldier. These problems tend to manifest themselves in terms of lowered effectiveness at work, lower

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<sup>34</sup> Jeffrey H. Greenhaus and Gary N. Powell, "When Work and Family are Allies: A Theory of Work-Family Enrichment," 86-88.

<sup>35</sup> Jeffrey H. Greenhaus and Gary N. Powell, "When Work and Family are Allies: A Theory of Work-Family Enrichment," 76.

<sup>36</sup> Theresa J. Russo, "Family Stress and Adaptation," in *Pathways to the Future: A Review of Military Family Research*, ed. Peggy McClure (Scranton, PA: Marywood University, 1999), 89.

<sup>37</sup> Theresa J. Russo, "Family Stress and Adaptation," 89.

commitment to the Army, and less preparation for upcoming missions.<sup>38</sup>

Institutions are considered “greedy institutions” when they make many demands on their members that require large amounts of time, energy, commitment, and sacrifice.<sup>39</sup> Unfortunately, both the Army and the family are greedy institutions, creating the potential for conflict and increased stress on the soldier as he or she attempts to balance the requirements and demands of two important institutions.<sup>40</sup> Studies have demonstrated that stresses experienced either in the work or family environments will have spill-over effects into the other environment. This spill-over presents as obstacle for the soldier as he strives to fulfill obligations in both systems.<sup>41</sup> This creates stress that is often complicated by commanders and supervisors who place military requirements above family needs and who do not allow their soldiers to address family responsibilities. In such an environment, the soldier will typically choose the Army over family, which further increases his or her stress.<sup>42</sup> In contrast, studies show that leaders can reduce this tension by modeling the correct balance between work and family in their own lives and by allowing soldiers to address their family concerns when possible. These types of commanders generate increased commitment to the Army both from their soldiers and from their soldiers’ spouses.<sup>43</sup>

As a result, many of the Army’s senior leaders are publicly recognizing the importance of

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<sup>38</sup> Theresa J. Russo, “Family Stress and Adaption,” 90.

<sup>39</sup> Bradford Booth, Mady W. Segal, and D. Bruce Bell, *What We Know About Army Families: 2007 Update* (Fairfax, VA: ICF International, 2008), 24.

<sup>40</sup> Bradford Booth, Mady W. Segal, and D. Bruce Bell, *What We Know About Army Families: 2007 Update*, 24.

<sup>41</sup> Gary L. Bowen and Dennis K. Orthner, *The Organization Family: Work and Family Linkages in the U.S. Military* (New York: Praeger, 1989), xi-xiii.

<sup>42</sup> Mady Wechsler Segal, “The Nature of Work and Family Linkages: A Theoretical Perspective,” 13-15.

<sup>43</sup> David R. Segal and Mady W. Segal, “Changes in the American Armed Forces: Implications for Military Families,” in *Pathways to the Future: A Review of Military Family Research*, ed. Peggy McClure, (Scranton, PA: Marywood University, 1999), 4.

Army families, as indicated both in statements and in the programs they are implementing throughout the Army. In a recent article, Army Chief of Staff General George Casey directly noted the sacrifices that Army families make as they support their soldiers and stated the Army needs to sustain its soldiers and their families. He also doubled the amount of money in the Army budget dedicated to Soldier and Family programs, focusing on health care, child care, youth services, and educational opportunities for family members.<sup>44</sup> Additionally, the Sergeant Major of the Army recently recognized Army families for their “inspiration and support”<sup>45</sup> and has called for an improvement in their quality of life.<sup>46</sup>

One outward sign of the commitment to families expressed by the Army’s senior leaders occurred with the introduction of The Army Family Covenant in October of 2007 (Figure 2).<sup>47</sup> The covenant was introduced in formal signing ceremonies at all Army installations and was followed by the implementation of the Soldier and Family Action Plan (SFAP) to accomplish the covenant’s promises. The SFAP focused on family programs and services, health care, housing, schools, youth services, child care, education and employment for spouses, and quality of life. The overall goal of the SFAP is to create an “Army-wide supportive environment within [which] soldiers and families will live and thrive.”<sup>48</sup>

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<sup>44</sup> General George W. Casey, Jr, "America's Army in an Era of Persistent Conflict," *Army Magazine* (October 2008): 20-21.

<sup>45</sup> Kenneth O. Preston, "Soldiers: America's Strength," *Army Magazine*, (October 2008): 34.

<sup>46</sup> Kenneth O. Preston, "Soldiers: America's Strength," 36.

<sup>47</sup> US Army Morale, Welfare and Recreation, *Army MWR Family Page*, .  
<http://www.armymwr.com/portal/family/> (accessed November 13, 2008).

<sup>48</sup> Lieutenant General Robert Wilson, "Leading the Army Installation Enterprise." *Army Magazine* (October 2008): 228.

## The Army Family Covenant

- We recognize the commitment and increasing sacrifices that our families are making every day.
- We recognize the strength of our Soldiers comes from the strength of their Families.
- We are committed to providing Soldiers and Families a Quality of Life that is commensurate with their service.
- We are committed to providing our Families a strong, supportive environment where they can thrive.
- We are committed to building a partnership with Army families that enhances their strength and resilience.
- We are committed to improving Family readiness by:
  - Standardizing and funding existing Family programs and services
  - Increasing accessibility and quality of healthcare
  - Improving Soldier and Family housing
  - Ensuring excellence in schools, youth services, and child care
- Expanding education and employment opportunities for Family members

Figure 2: The Army Family Covenant, introduced in October 2007.

Although this public recognition of Army families is welcome and appropriate, one can question the motives behind the programs. Studies show that retention is getting harder because the Army must compete with civilian employers for quality personnel. In response, the Army (and the other Armed Forces) has widened its view by recognizing that family satisfaction is a key factor in soldier retention.<sup>49</sup> Recent statements from senior leaders such as Lieutenant General (LTG) Jack Stultz recognize that many programs can recruit soldiers, but “we retain families.”<sup>50</sup> In the same article, LTG Stultz continues describing many of the initiatives in the US Army Reserve intended to make family life easier, thus creating the conditions for increased soldier retention. Another senior leader, LTG Stephen Speakes recently noted that “we must sustain our Army by attracting quality recruits, retaining soldiers and families, continuing to improve their quality of life (including their medical care) and continuing to support the families of the fallen. These efforts are critical to maintaining the viability and quality of the all-volunteer

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<sup>49</sup> David R. Segal and Mady W. Segal, "Changes in the American Armed Forces: Implications for Military Families," 4.

<sup>50</sup> Lieutenant General Jack C. Stultz, Jr, "The Army Reserve: Ready for the Next 100 Years," *Army* (October 2008): 154.

force.”<sup>51</sup> Such statements indicate that senior leaders primarily recognize the importance of military families and spouses only as they relate to soldier work performance and retention. This attitude, while valid, may be very shortsighted and inadequate.

In addition to Army leaders’ public statements, recent studies sponsored by the Army Research Institute (ARI) focus on officer and soldier retention. One study of existing surveys and literature to determine the effect of increased troop deployments on soldier retention. In addition to deployments, this study notes the impact that the family has on retention.<sup>52</sup> ARI’s study by Gibson and Tremble studies officer retention by surveying 254 Army captains. Their recommendations focus largely on the actions that Army leaders should take and on Army programs to implement that will cause greater officer retention.<sup>53</sup> While there is no doubt that Army families deserve recognition and that they are crucial to soldier retention, studies and statements such as these indicate that many senior Army leaders do not fully recognize the potential value that Army spouses can offer to the organization. This may be a very unfortunate oversight since there are 287,579 married service members in the total Army.<sup>54</sup>

There is little direct research that demonstrates the effect that Army spouses can have on organizational change efforts, but deployment studies offer some insights. Studies indicate that when soldiers and family members receive scarce or contradictory information about deployments, there is an increase in spousal and family stress.<sup>55</sup> Conversely, spouses who are

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<sup>51</sup> Lieutenant General Stephen M. Speakes, "Resourcing the Army For an Era of Persistent Conflict," *Army*, (October 2008): 222.

<sup>52</sup> Michelle M. Wisecarver, Meredith L. Cracraft, and Tonia S. Heffner, *Deployment Consequences: A Review of the Literature and Integration of Findings into a Model of Retention*, (Arlington, VA: Army Research Institute for the Behavioral and Social Sciences, 2006), v-vii.

<sup>53</sup> Jennifer L. Gibson, and Truman R. Tremble, *Influences of Work-Life Support of Officers' Organizational Commitment and Negative Work-Family Spillover*, (Arlington, VA: United States Army Research Institute for the Behavioral and Social Sciences, 2006), v-vi.

<sup>54</sup> Betty D. Maxfield, *Army Demographics: FY 07 Army Profile*, (Department of the Army, Deputy Chief of Staff of Personnel, G-1, Human Resources Policy Directorate, September 30, 2007).

<sup>55</sup> Bruce D. Bell and Walter R. Schumm, "Family Adaptation to Deployments," in *Pathways to the*

prepared for deployments and who worry less about the mission tend to show more support for the deployment. In turn, this preparation and knowledge of the mission reduces the soldier's levels of perceived spousal stress, increases retention, and reduces negative effects from the soldier's family.<sup>56</sup> Additionally, spouses who understand and believe in the mission experience less stress during the deployment.<sup>57</sup> Similarly, spouses who report overall positive attitudes about a deployment adapt better to the changes that the deployment brings.<sup>58</sup> This study demonstrated the importance of leader communication to spouses about significant organizational events. Understanding the way that open and honest communication about a deployment affects military spouse attitudes and helps spouses adapt and support the mission demonstrates how similar communication can also positively affect the spouses' attitude about an organizational change.

While this relationship seems obvious, Army leaders have struggled in the past with how to measure the outcomes of family programs and other efforts that are aimed at improving soldier and family quality of life, readiness, and retention.<sup>59</sup> Given this current challenge, quantifying a spouse's influence about an organizational change appears much more elusive. However, the theory of margin may offer a way to do this.

The important question is exactly how effective spouses are at communicating organizational change messages as a part of a soldier's principal support network. In short, do spousal attitudes about a soldier's job influence his or her behavior at work? This is a significant question because its answer offers commanders another communication channel to the soldiers in

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*Future: A Review of Military Family Research*, ed. Peggy McClure (Scranton, PA: Marywood University, 1999), 112.

<sup>56</sup> Bruce D. Bell and Walter R. Schumm, "Family Adaptation to Deployments," 111.

<sup>57</sup> Bruce D. Bell and Walter R. Schumm, "Family Adaptation to Deployments," 114.

<sup>58</sup> Bruce D. Bell and Walter R. Schumm, "Family Adaptation to Deployments," 113.

<sup>59</sup> Gary L. Bowen, "Family Factors and Member Retention: A Key Relationship in the Work and Family Equation," in *The Organization Family: Work and Family Linkages in the U.S. Military*, ed. Gary L. Bowen and Dennis K. Orthner, (New York: Praeger, 1989), 144, 157.

their units that potentially increases the likelihood of success for the organizational change. Not only do spouses form another channel, but American conventional wisdom offers that they may be the most important factor in determining an employee's happiness or frustration and overall quality of life. Research supports this belief and shows that among married people in both civilian and military occupations, people look to their spouse as their primary source of informal support when experiencing stress.<sup>60</sup> The challenge is to quantify this effect to determine the validity of the conventional wisdom.

The theory of margin and its margin in life (MIL)<sup>61</sup> concept may offer the way to quantify the effect that spouses can have on soldiers and thus aid in determining how useful spouses are as agents of principal support in organizational changes. As a lifelong educator who studied adult learning and informed many adult learning strategies, Howard McClusky's theory of margin, first introduced in 1963, is one of his most significant and lasting concepts. McClusky argued that there are two key factors in adult life – load and power. Load is defined as anything that a person must use physical or mental energy to address; power is a source of energy that can be applied against the load. In general, load is considered a negative influence, often called a burden, and power is considered positive, often called a strength.<sup>62</sup> Some common sources of load include tasks connected with family, work, and other external commitments. Another source of load is the expectations that an individual sets for himself. Power is what the individual has at his disposal to assist him in carrying his load and includes physical traits, social relationships, mental attributes and economic factors. Another source of power is an individual's ability to

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<sup>60</sup> Bradford Booth, Mady W. Segal, and D. Bruce Bell, *What We Know About Army Families: 2007 Update*, 103-106.

<sup>61</sup> Margin in life, or MIL, is the mathematical value for margin and is expressed by the mathematical formula  $(1 - (\text{load} / \text{power}))$ . A more adequate explanation will follow later in this section.

<sup>62</sup> Howard Y. McClusky, "The Course of the Adult Life Span," in *Psychology of Adults*, by Irving Lorge, Howard Y McCluskey, Gale E Jensen and Wilbur C. Hallenbeck, (Chicago: Adult Education Association of the U.S.A., 1963), 15-18.



acquire new skills that help him deal with his load.<sup>63</sup>

Simply put, McClusky's states that adults are constantly seeking to balance aspects of load and power in their lives. He offers that the load to power ratio, called margin and expressed mathematically as (load/power), offers the secret to understanding how adults adjust to changing conditions in their lives. He offers that when load to power ratios approach the number 1 and remain there for too long, that an adult is close to breakdown and cannot effectively cope with life changes. McClusky states that the ideal margin is between .50 and .80.<sup>64</sup> Values in this range give an individual enough margin, or excess power, to deal with life's changes.<sup>65</sup> The related concept of MIL is derived from McClusky's original concept and is defined as "the vitality or freedom a person must have to continue living and to meet new challenges."<sup>66</sup> From this, one can see that MIL is related to margin in definition. However, the two concepts differ in derivation and expression. Simply put, in margin higher numbers indicate higher load and the inverse is true when expressing MIL, as seen below.

Although McClusky derived a formula for calculating MIL, he did not conduct any research to determine its validity. McClusky postulated that MIL is calculated using the formula  $(1 - (\text{load} / \text{power})) = \text{MIL}$ . In this equation, acceptable MIL is determined to be between .30 to .70, with higher values indicating greater available margin and increased ability to deal with stresses and to learn new tasks.<sup>67</sup> In 1982, Stevenson made a lasting contribution to the body of literature by conducting research to qualitatively measure MIL using McClusky's formula. Her results determined a reliable, yet complex and time consuming method for measuring MIL in

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<sup>63</sup> Howard Y. McClusky, "The Course of the Adult Life Span," 15-16.

<sup>64</sup> Howard Y. McClusky, "The Course of the Adult Life Span," 16-17.

<sup>65</sup> Howard Y. McClusky, "A Differential Psychology of the Adult Potential," 149.

<sup>66</sup> Joanne S. Stevenson, "Construction of a Scale to Measure Load, Power, and Margin in Life," *Nursing Research* 31, no. 4 (July-August 1982): 222.

<sup>67</sup> Joanne S. Stevenson, "Construction of a Scale to Measure Load, Power, and Margin in Life," 222.

individuals. This research has become widely cited in many different disciplines, including the fields of organizational development and change. This is because the available evidence suggests that individuals with higher MIL are not only more receptive to learning, but are also more ready to cope with organizational changes.<sup>68</sup>

McClusky concludes that the presence of margin is “essential to the mental hygiene of adulthood”<sup>69</sup> and indicates an individual’s potential for learning and adaptation. In another study, Hanpachern, Morgan and Griego make the next significant stride in understanding MIL by constructing a simpler scale than Stevenson. Their study is also important because they extend the theory and conclude its validity in organizational change efforts by concluding that sufficient MIL in an individual indicates potential for RFC.<sup>70</sup>

The theory of margin can help demonstrate how spouses provide principal support for organizational change because family life is an external factor that is very important to an employee’s MIL. In the best cases, family support positively affects MIL either by decreasing load or by increasing power. The opposite relationship is true in the worst cases. According to Hanpachern, Morgan, and Greigo, family ranks high as both a potential load and as a potential power in employees. This is congruent with other studies that indicate that Americans get the most life satisfaction from their family life.<sup>71</sup> The relationship between family, MIL, and RFC becomes clear in Madsen’s 2006 study in which she determined there is a correlation between these elements based upon the employee’s perception of the power they derive from their family. Like Hanpachern, Madsen concludes that high MIL in an employee indicates an ability to deal

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<sup>68</sup> Susan R. Madsen, Cameron R. John, Duane Miller, "Influential Factors in Individual Readiness for Change," *Journal of Business and Management* 12, no. 2 (2006): 95.

<sup>69</sup> Howard Y. McClusky, "A Differential Psychology of the Adult Potential," 17.

<sup>70</sup> Chutima Hanpachern, George A. Morgan, and Orlando V. Griego, "An Extension of the Theory of Margin: A Framework for Assessing Readiness for Organizational Change," 349.

<sup>71</sup> Mady Wechsler Segal, "The Nature of Work and Family Linkages: A Theoretical Perspective," 16.

with the stresses of organizational change and indicates RFC. Madsen continues to say that employees who are not burdened by work and nonwork demands are ready to undertake the additional work demands that the transformation will require of them.

The theory of margin is time-tested and widely cited and is therefore useful to this study. One of the reasons for this is because the theory is easy to understand and does not make claims that fall outside of normal expectations. Another positive aspect is that other authors have built upon the original theory to further its utility. Additionally, research acknowledges the efficacy of organizational efforts to support the employee's nonwork domain due to evidence that this will positively affect employee commitment to the organization. However, the existing research does not explore the potential of directly targeting spouses as a source of principal support to increase an employee's MIL and thus his or her RFC.<sup>72</sup>

In conclusion, MIL is a way to quantify margin in individuals and is useful in adult learning or organizational change applications. Additionally, MIL is one of the few tools that one can use to recognize the family's effect on an employee while quantifying individual RFC, which is critical to this study of how spouses can influence soldiers.

## **Research Methodology**

The purpose of this research is to determine if Army spouses are significant sources of principal support who can assist leaders in creating individual RFC for organizational changes. The primary hypothesis is that spouse support for organizational transformations at work increases the soldier's MIL. If this is true, then spouses contribute to improving a soldier's RFC and thus become agents of principal support. The end result of the research is to recommend that leaders should communicate their change message to spouses to increase soldier RFC and thus increase the potential for successful organizational change.

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<sup>72</sup> Chutima Hanpachern, George A. Morgan, and Orlando V. Griego, "An Extension of the Theory of Margin: A Framework for Assessing Readiness for Organizational Change," 347-348.

The primary research method was to conduct a survey targeting two audiences. The first audience was Army officers who had been change leaders at some point in their career to determine if they used or considered using spouses to help create RFC in their organizations. These respondents also had the option of completing the survey as an individual who experienced organizational changes in units to determine how their spouses' involvement and awareness affected their RFC. The second audience was soldiers' spouses to determine if they had been included in past change efforts. The survey sought the following information:

1. How leaders in the Army communicate their change messages.
2. How these forms of communication influence their subordinates.
3. How these forms of communication influence spouses.
4. How leaders communicate directly to spouses about organizational changes.
5. How effective the leader communication to spouses is from the spouse perspective.
6. If the organizational change was successful or unsuccessful.
7. The influence that the spouse had on the soldier, as reported by the soldier.
8. The influence that the soldier had on the spouse, as reported by the spouse.
9. The soldier's MIL.
10. The spouse's MIL.

The targeted population was a random sample of US Army officers attending the Command and General Staff College and the School of Advanced Military Studies. The respondents were selected through a random selection program and received an email request to participate in the optional study. Respondents answered a series of questions based upon an organizational change that they participated in at some point in the past. Soldiers took the survey from the perspective either of the leader or of a subordinate in the event. They were then prompted to forward an optional survey link to their spouse. After two weeks, participants received an email reminder to complete the survey. In all, there were 202 survey solicitations. Fifty soldiers responded to the survey for a return rate of 24.8%. Additionally, 23 soldiers forwarded the survey to their spouses, of these 5 spouses took the survey.

The majority of the questions in the survey relate to Armenakis' five domains of the change message as discussed earlier. This focus is valid since other researchers, such as Kotter and Collins, include elements in their models that suggest their recognition of the importance of

leader communication and of the five domains of discrepancy, appropriateness, principal support, efficacy, and valence. Survey responses helped determine how Army leaders communicate their change messages and how their subordinates perceive the communication. The full text of the survey is included in Appendix 1, Survey to Determine Spousal Influence in Army Organizational Change Efforts.

1. My job...	1 = Takes a lot of my energy – it physically or mentally drains – a load on my shoulders
2. Balancing my work and family...	2 = Takes some of my energy – it somewhat drains me – somewhat of a load on my shoulders
3. My physical and mental health...	3 = Neither takes energy nor provides joy, pleasure, strength, or richness for me.
4. My relationship with my boss...	4 = Provides or creates some joy, pleasure, strength, or richness for me – gives me some energy/power in life.
5. My social relationship in the workplace...	5 = Provides or creates a lot of joy, pleasure, strength, or richness for me – gives me energy/power in my life
6. My current job knowledge and skills...	
7. The demands of my job...	
8. My commitment to this organization...	
9. My family...	

**Figure 3: The Questions and Responses Used to Calculate MIL in the Survey. Respondents completed the phrases on the left with one of the responses on the right.** <sup>73</sup>

The next portion of the survey assisted in determining the respondents' MIL. These questions represent the latest evolution in MIL calculation, which began in 1982 with Stevenson's study. In 1997, Hanpachern revised Stevenson's work to produce a much shorter 50 question scale. Madsen further revised Hanpachern's survey in 2006 with a nine question format to effectively calculate MIL, which is used in this study.<sup>74</sup> This particular survey is reliable with a

<sup>73</sup> Susan R. Madsen, Cameron R. John, Duane Miller, "Influential Factors in Individual Readiness for Change," 102-103.

<sup>74</sup> Susan R. Madsen, Cameron R. John, Duane Miller, "Influential Factors in Individual Readiness for Change," 102.

Cronbach's Alpha of .86.<sup>75</sup> Respondents completed nine phrases with one of five possible responses that reflected their views as shown in Figure 3.

The survey responses were compared using statistical analysis to determine the correlation between different variables in the survey. The primary statistical tool was the Pearson correlation which tested the magnitude and the direction of the relationships between the responses.<sup>76</sup> Unlike Hanpachern and Madsen, this study did not analyze the data based upon demographic information. The Pearson correlation charts are located in Appendices 2 and 3. Once again, these results are reliable with a Cronbach's Alpha of .865.

Due to the low number of responses from the Army spouses, there is no statistical comparison of their survey data. While the spouse responses will provide information to inform the study, the results cannot be considered scientific. As such, this data has limited value for generalization to the overall population of Army spouses. However, the spouse survey information will augment other information about Army spouses.

In addition to the survey data collected, this study sought additional historical evidence to support the thesis. This evidence came from the Army Family Oral History Project (AFOHP), a collection of interviews that captures both Army spouses' experiences and the unique contributions that they have made to the US Army. The AFOHP began as an attempt to capture the historical records of spouses as units deactivated following Operation Desert Storm. Interviewees have a minimum of 15 years affiliation with the Army to ensure they have adequate

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<sup>75</sup> Cronbach's Alpha is a coefficient of reliability that expresses how well a set of questions measures a particular underlying construct. Cronbach's Alpha significance test ranges from .00 to 1.00. In general, numbers above .70 are considered reliable and are thus acceptable in social science research. The score in this case indicates that one can be 86% certain that the results are sound and interpretable and not a result of random error. In this case, the questions in Madsen's survey measure the construct of MIL and her survey is considered reliable because of the high Cronbach's Alpha.

<sup>76</sup> The Pearson Correlation is expressed as a number between +1 and -1 and represents the degree to which two variables are related. This is also commonly referred to as "Pearson's R." A correlation of +1 indicates a perfect positive linear relationship between two variables. Similarly, a correlation of -1 indicates a perfect negative linear relationship between two variables. A correlation of 0 indicates there is no linear relationship between the variables.

experience and maturity. The women interviewed have varied involvement with the Army from the 1930s through the 1980s, which offers a broad range of experiences and captures much of the Army's 20<sup>th</sup> century history.<sup>77</sup> This interview collection informs about the nature of the Army, as seen through the spouses' eyes. In addition, these interviews describe both the nature and the extent of support that military spouses provide for their soldiers, which will help provide some depth to the survey data.

There are a few underlying assumptions that are critical to this survey research. The first assumption is that the survey participants accurately remember their roles and feelings during the organizational change to which they referred. Next, the research assumes that soldiers and spouses share similar values about family life. In other words, the assumption is that the soldier is concerned with how his or her spouse feels about his or her occupation and the events that are occurring at work, and particularly that the spouse's feelings affect the soldier's work attitude. Third, since researchers have established the phenomenon of family-work spillover, this study assumes there is spillover in the respondent's life. Following the logic of the two previous assumptions, the expectation is that the surveyed families have a high degree of social exchange. In such relationships, individuals only undertake actions affecting their spouse that generate rewards and that avoid costs.<sup>78</sup> This is critical in building the case for MIL.

The most significant limitation in this study stems from the lack of spouse-conducted surveys. There is no sound way to conduct statistical analysis from a sample size of 5. As such, while the spouse surveys provide insight and information, any analysis gained from them is neither scientific nor definitive. That being said, there is great utility for future researchers to

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<sup>77</sup> Mary Ann Meigs and Elizabeth K. Rutherford, *Army Family Oral History Project Finder's Guide*, [http://www-cgsc.army.mil/carl/resources/archival/army\\_family.asp](http://www-cgsc.army.mil/carl/resources/archival/army_family.asp) (accessed January 9, 2009).

<sup>78</sup> Gary L. Bowen, "Toward Conceptual Refinement of Operational Outcome Variables: The Case of Family Life Satisfaction," In *The Organization Family: Work and Family Linkages in the U.S. Military*, ed. Gary L. Bowen and Dennis K. Orthner (New York: Praeger, 1989) 148).

obtain larger samples of Army spouse data to accurately determine their experience and influence. Aside from this specific instance, there are some additional general limitations in the study.

Survey data is necessarily limited because respondents do not have the opportunity to explain many of their responses and because the survey format does not allow the researcher to conduct follow-up questions to gain greater insight. Based upon this fact, there are several limitations in the current study. First, the survey does not account for any social influences on the spouse other than the commander's deliberate efforts to share his change message. For example, there is no way to determine how a spouse's attitude is shaped by other spouses or other members of the unit. Next, the survey does not give an explanation for spousal attitudes generated by a commander who attempts to influence spouses, but is a poor communicator or lacks the necessary social power to influence spouse behavior. A limitation that is beyond the scope of this study is that there is no consideration for differences in MIL and family attitudes that could be reflected during the different stages of family development. Similarly, the survey does not explicitly consider the effects that the soldier's children may have on his or her attitudes about the organizational change.

While all military respondents were authenticated, they were asked to email their spouse a hyperlink to the survey. Because of this method, the spouse versions of the survey are not authenticated, which means there is no way to determine who the soldiers actually sent the survey link to, although the assumption is that they did send the survey to their spouse. This is a reasonable assumption because of the general nature of military respondents.

This survey asked very little demographic information, which does limit the data to some degree. Most notably, the demographic information does not indicate if the respondent was male or female – only if he or she is a soldier or the spouse of a soldier. The demographic information also does not ask if an individual is married to another soldier. While these are important factors, the focus of this study was to determine if spouses of any gender influence the soldier's attitudes



about an organizational change. The deliberate imposition of this limitation stems from research that shows family and self aspects of MIL are less significant factors with RFC than others are.<sup>79</sup> Additionally, given the small sample size, further division of the results would have diluted the results to statistical insignificance. Future research should fully examine the influence that both male and female spouses have on soldiers and should also examine if there is a unique relationship in dual military families.

Another limitation of this particular study is based upon the surveyed population. Because the respondents were all students at the Command and General Staff College and the School of Advanced Military Studies, they share a similar, although not identical, background in terms of military rank, age, education level, and other demographic similarities. A more accurate representation of the whole Army would include individuals of varied ranks and experience levels, however gaining that depth was impractical for this research. Ideally, further research will account for this limitation as discussed in the following section.

## **Research Analysis**

The results from the survey yield many interesting findings that communicate the nature of spouse involvement in Army organizational change efforts. The research question in this study is, are Army spouses significant sources of principal support when Army leaders seek to create readiness for change? If the answer to this question is yes, then leaders should communicate their change message to spouses to increase soldier RFC. The answer to this question lies in the hypothesis that Army spouses contribute to higher MIL in soldiers which will result in higher RFC for organizational change efforts. The survey data collected from the soldiers supports the question despite showing no significant correlation between MIL and RFC in soldiers. In short,

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<sup>79</sup> Chutima Hanpachern, George A. Morgan, and Orlando V. Griego, "An Extension of the Theory of Margin: A Framework for Assessing Readiness for Organizational Change," 345-348.

the study answers the research question positively, without proving the hypothesis.

The analysis of the survey questions revealed that there was no significant direct correlation between either spouse support for a change and MIL or between MIL and individual RFC. The survey revealed high participant MIL, but no positive correlation between MIL and the change. In fact, there were actually significant negative correlations between some aspects of MIL and some factors regarding the organizational change. While disappointing, this is not entirely surprising since Madson, et al. determined that in high MIL populations, there is often little relationship between MIL and RFC.<sup>80</sup>

Additionally, while Hanpachern, et al. do note the importance of social relationships and family to an individual's high MIL, their study also finds that the social relationships carry less importance to overall RFC than factors such as job knowledge, job skills and leadership-management relations.<sup>81</sup> The current study recognized this fact, but wanted to determine if there was a difference in an organization with a high level of family involvement, such as the Army, and the civilian businesses studied previously. The data demonstrates that Hanpachern's findings appear valid in both military and civilian settings.

This being said, the topic should remain open for future study. One of the stated limitations of this research was the number of responses, particularly from spouses, which limits generalization. Another limitation stems from the relatively similar population taking the survey. The sample population share many demographic traits such as level of education, past job experiences, and marital status that may account for the MIL findings. One may get entirely different results by surveying all the soldiers and spouses in one military organization. Individuals in such a population would have different ranks, levels of education, length of time in the

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<sup>80</sup> Susan R. Madsen, Cameron R. John, Duane Miller, "Influential Factors in Individual Readiness for Change," *Journal of Business and Management*, 12, no. 2 (2006): 108.

<sup>81</sup> Chutima Hanpachern, George A. Morgan, and Orlando V. Griego, "An Extension of the Theory of Margin: A Framework for Assessing Readiness for Organizational Change," 345.

military, family development, and job experiences. Such a sample would also include both enlisted and commissioned military members. This type of varied sample might show different correlations between MIL and RFC than the current study shows.

## Analysis of the Soldier Surveys

Despite the failure to effectively prove that spouses increase MIL and thus RFC in soldiers, this study effectively demonstrates that Army leaders should communicate change messages to spouses because they are significant sources of principal support for soldiers in organizational change efforts. *The most significant conclusion in this research is that there is a high correlation between spouse involvement in and support of an organizational change and the success of the change.* The Pearson correlation of survey data showed significant relationships between spouse involvement in change and its success and is shown below. Soldier respondents judged that successful organizational changes shared the following qualities:

	Pearson Correlation
1. Leaders recognized that spouse support was essential to successfully implementing the change	.310
2. Leaders actively involved spouses in the change effort	.577
3. Spouses were knowledgeable about the change effort	.601
4. Spouses thought that the change was the right one for the organization	.490
5. Spouses were comfortable with the change	.564

Next, the soldier survey noted a relationship between spouse influence and the soldier recognizing that there was a need for change in the organization. The analysis showed significant correlation between the soldier recognizing the need for the change, or discrepancy, and two factors. The first factor was spouse agreement that the change was the right one for the organization, with a positive correlation of .342. The second was spouse involvement in the

process, with a correlation of .286. The data demonstrated a clear relationship between the soldier's discrepancy and both the spouse's discrepancy and involvement.

Simply recognizing that there is a need for change in the organization is an important part of the overall process of creating RFC, but it alone is inadequate. To be successful, the change leader must communicate the appropriateness of his plan, which means that the plan will produce desired, effective results and is the right change for the unit. Not surprisingly, the survey showed a strong correlation between the soldier's reported attitude and the attitude his or her spouse had about the change. In particular, soldiers were most affected and acknowledged appropriateness when:

	Pearson Correlation
1. Their spouses shared their opinions about the change.	.448
2. Their spouses talked to other people about the change.	.565
3. Their spouses shared their feelings about the change leader.	.621
4. Their spouses expressed confidence in the change leader.	.612
5. Their spouses were involved in the change process.	.578
6. Their spouses were included in the change process, regardless of their actual level of involvement.	.506

Once the soldier recognized that there was a need for change in the organization and formed an opinion about the change, he or she still had to make a decision about how to behave. In other words, the soldier could choose to either support or resist the leader's transformation efforts. However, spousal influence also played an important role in how the soldier responded to the change. The evidence shows that soldiers reported higher levels of support for the change when they observed the following qualities in their spouse:

	Pearson Correlation
1. Their spouse was knowledgeable about the change.	.327
2. Their spouse agreed that the change was the right one for the organization.	.527
3. Their spouse was comfortable with the change.	.451

Finally, the most important finding for Army leaders synthesizes all of the information presented thus far by noting there is a high correlation between actively including spouses in the change process and the success of the change effort. Given the understanding from the soldier surveys that communicating the message to spouses will benefit the commander by making his change effort more likely to succeed, what are the most important things that he or she can do? This study showed high correlation between several techniques that commanders used to communicate the message to spouses and both the spouses thinking that the change was the correct one and success for the change effort. The Pearson correlation for this data is summarized in Figure 4 and fully listed in Appendix 5, the discussion follows.

One goal of the change message is to communicate appropriateness by getting others to see that the change is the right one. The earlier discussion demonstrates that the leaders who actively involved spouses in the change effort gained their buy-in for the change. While there are many ways to communicate, some methods appear to be more effective. First among these methods is to provide written material to spouses that describe the change. Next, the leader should proactively explain why change is necessary. The leader should do this in number of settings, but the communication appears to be most effective when done in informal meetings with spouses. Another effective way to explain the change is to go to typical meetings that spouses already attend and answer their questions in that setting. While there is still significant positive correlation, a less effective means is to schedule unique meetings to specifically discuss the change. However, while all of these techniques increase the likelihood of spousal principal

support, not all of them translate into a successful organizational change. Once again, these findings are summarized in Figure 4.

Leader techniques to communicate the change message to Army spouses:	Helps spouses gain appropriateness (agreement that this is the right change)	Pearson Correlation	Contributes to successful organizational change	Pearson Correlation
Providing spouses with written material describing the change	Yes	.392	Yes	.394
Proactively explaining why the change is necessary	Yes	.382	Yes	.388
Using informal meetings to directly discuss the change	Yes	.372	Yes	.341
Attending spouse meetings to answer questions about the change	Yes	.345	Yes	.291
Establishing special meetings to directly discuss the change	Yes	.299	No	.157 (No significant correlation at the .01 or .05 level)

**Figure 4: Leader Actions Contributing to Increased Spousal Appropriateness and to Successful Organizational Change**

The leader's primary goal when communicating the change message is to generate support so that the change is successful. The study shows that the best way to communicate the message is to provide the spouses with written materials that describe the change. The next best technique is proactively explaining why the change is necessary. This is most effectively done in informal situations, followed by answering questions in existing meetings. Most interesting to this is that there is no correlation between establishing special meetings to discuss the change and successful organizational change. These results are summarized in Figure 4.

To summarize, the results of the soldier survey show a clear correlation between several

elements. First, there is a definite relationship between spouse involvement in the change and its success. Next, the soldier understood the discrepancy of the change more often when his spouse did as well and similarly was more likely to support the change when his spouse did. Additionally, soldiers are more likely to support the change when their spouses were knowledgeable of and comfortable with the change. Finally, the data from the soldier survey shows the most effective methods of leader communication that can gain spouse appropriateness and contribute to successful organizational change. These methods include providing written materials, proactively explaining the change, and going to meetings to talk about the change. The remaining question to ask is if there are similar patterns among the spouse survey data.

### **Analysis of the Spouse Surveys**

Due to the paucity of responses, the surveys completed by the spouses can only offer descriptive data. Of the five surveys returned, only four were usable; of these, three of the reported change efforts were successful and one unsuccessful. These survey results are included in Appendix 4. This section will address the implications from the spouse survey responses. This being said, there is no attempt at larger generalization for the overall Army spouse population. However, these results suggest utility in conducting larger studies to better determine and generalize spouse influence and attitudes regarding organizational change efforts in the Army. Overall, the spouse data in this study supports the conclusions gained from the soldier data discussed above.

The first similarity between the spouse and soldier surveys is the influence that married Army couples appear to have on one another. As discussed earlier, there is a correlation between a soldier's attitudes about the change and his spouse's attitudes. From these spouses' perspectives, there is also an indication that their soldiers' attitudes about the change affected their attitudes. Three of the respondents strongly agreed that their soldier influenced their attitude, one disagreed. While generalizing from the data is impossible, the limited evidence does imply

there is some degree of social exchange in these families, which when considered with the soldier survey findings, suggests the validity of the study's assumption of the presence of social exchange in the respondents' marriages.

Next, these spouse surveys help illuminate the central question of how spouse involvement affects soldier RFC and overall change success. Most significantly, all four of the spouses supported the change effort and noted that the change leader actively involved them in the process and considered their support essential. However, this support was not a guarantee for successful transformation, indicating there may be some elements that contribute to success better than others, as seen in the soldier surveys.

The most significant indications gathered from the spouse survey imply the importance of how the change leader communicates his or her message to the spouses and directly relate to the findings from the soldier surveys. Of the three successful change interventions, the respondents stated that the leader did use the five techniques listed above and noted in Figure 4. In the one instance of a failed effort, the leader did not use two of the techniques at all.

Based upon the responses, the first neglected technique was failing to provide spouses with written materials that described the change. In addition, the survey shows that the leader of the failed change effort did not proactively explain why the change was necessary. These are related techniques that can indicate the level of commitment that the leader has for the proposed change. In other words, this leader appears to have failed to demonstrate principal support by not making the change part of his or her daily life and by not taking the time to prepare materials to support the transformation effort.

Most notable is that the spouse who reported this failed attempt did not recognize the need for change in the organization. Despite this, she still supported the change. Unfortunately, without clear communication from the leader, she and others may have tried valiantly to succeed without fully understanding what to do. This spouse appears to have displayed the traits that tend to define Army spouses and could have constructively contributed to the organizational change if



given the right guidance.

## Final Analysis

Before concluding this section, a discussion on exactly what the Army spouse's historical role has been and how they have played an important part in the Army's history would be valuable. Starting with an Army spouse's feelings about her role, Virginia Callaghan may have summed the feelings up best with her short statement, "I think along with your husband, you are in the Army. It is your career too..."<sup>82</sup> Many of the wives interviewed in the AFOHP shared similar sentiments.

Before proceeding further, there are some important caveats to address. First, there are no dual military spouses interviewed in the AFOHP. This is unfortunate since current Army demographics show that 9% of Army married couples are dual military.<sup>83</sup> Additionally, there are no male spouse interviews in the collection. However, the interviews do span a large period of time and address many significant Army, societal, and social changes, and the following conclusions are general and taken from the entire period covered in the interviews. The general conclusions made in this section parallel the current characteristics and contributions of many Army spouses. Finally, since the conclusions reached here are gained from the AFOHP interviews of female Army spouses, references will be in the feminine gender.

A composite image of an Army spouse would be rather inspiring. She would feel like part of the Army. She would display tremendous creativity, flexibility, and support through many different types of trials and discomforts to support her husband's career and to serve her nation. Whether it included sailing for weeks on crowded troop ships to overseas destinations or moving 27 times over one military career, these women have historically shown immense dedication and

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<sup>82</sup> Virginia D. Callaghan, interviewed by Betty Rutherford, February 20, 1998, Interview with Virginia Callaghan for the Army Family Oral History Project.

<sup>83</sup> Betty D. Maxfield, "Army Demographics: FY 07 Army Profile," 2.

service to the Army.<sup>84</sup>

The historical Army wife showed complete dedication to their family and often had little time for hobbies or personal interests. Grace Fontenot noted that during her husband's career she "was mother, father, cook, chauffer, doctor, nurse, anything that was necessary I did. Because he was busy making a living in the military."<sup>85</sup> The Army spouse develops a sense of community with all other Army wives because they fully understand one another.

Another aspect of the Army wife is her willingness to volunteer in the community. This is a very obvious trend in the AFOHP interviews as nearly every spouse volunteered in some capacity, but often considered her efforts insignificant and not nearly enough. However, in forming this composite view of the Army spouse, it is very difficult to imagine the military community functioning without them. Inez Cardillo said that Army spouses were, "wonderful, socially active, interesting women. A lot of them wanted to be part of the Army."<sup>86</sup> These women are involved in the Brownie Scouts, Girl Scouts, and Cub Scouts. They volunteer at the local Red Cross. Army wives are Sunday school teachers and room moms in local schools. They volunteer at the local museums and work in their installation's thrift shop. They fill positions that serve the community's existing needs and volunteer to organize and accomplish the work when new needs arise.

To the direct benefit of their husbands and to military units, Army spouses support Army families. Before the Army had formal family support groups and family readiness groups, these women were taking care of soldiers and families. Katherine Gerges felt strongly about this aspect of her life and reflected on her husband's time as a company commander by noting that, "My

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<sup>84</sup> Marjorie Hines, interviewed by Betty Rutherford, April 28, 1998, Interview with Marjorie Hines for the Army Family Oral History Project.

<sup>85</sup> Grace Y. Fontenot, interviewed by Betty Rutherford, October 28, 1999, Interview with Grace Fontenot for the Army Family Oral History Project.

<sup>86</sup> Inez Cardillo, interviewed by Betty Rutherford, September 2, 2001, Interview with Inez Cardillo for the Army Family Oral History Project.

husband was a company commander, and he had a responsibility for all these men and so, I needed to take care of the wives, I needed to support the wives and that would only make my husband's job easier."<sup>87</sup> In many cases these women monitor the pulse of their husbands' organizations and work to make the units and families better despite tough conditions. In some cases, these women helped to usher in new changes in the Army, such as when the first black officers were integrated into previously white units.<sup>88</sup>

Given this composite profile of the Army spouse and the statistical evidence supporting the assertion that spouses are significant sources of principal support, it seems rather obvious that Army leaders must deliberately communicate their change messages to the spouses. Change leaders must recognize the key link that spouses provide in contributing to individual RFC. These leaders would also be remiss for not harnessing the power and energy of Army spouses by incorporating them in such significant and critical unit events as organizational change.

## Conclusions

"It's important to touch people, you need to make them, those wives feel like they're important, that what they do is of value. But not too many people tell them that. And I saw that my biggest job, was somehow to convey the appreciation of what they do and how valuable it is in all ways."<sup>89</sup>

The aim of this research study is to demonstrate that Army spouses are significant sources of principal support in organizational change efforts. The selected method for proving this was by showing that spouse support for changes at work adds power to a soldier's MIL and

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<sup>87</sup> Catherine Gerges, interviewed by Erin West, February 10, 1998, Interview with Catherine Gerges for the Army Family Oral History Project.

<sup>88</sup> Marion Bartholt, interviewed by Betty Rutherford, April 28, 1998, Interview with Marion Bartholdt for the Army Family Oral History Project.

<sup>89</sup> Elizabeth (Betty) Rutherford, interviewed by Erin West, November 20, 1998, Interview with Elizabeth Rutherford for the Army Family Oral History Project.

thus increases his or her RFC. This study determined that Army spouses are significant sources of principal support and contribute to individual RFC; however there appears to be no correlation between the soldiers' MIL and the success of organizational change efforts. Despite this, there are still many promising conclusions.

First, there is a need to conduct more research on MIL and its relevance in organizational change interventions. To date, there have been limited studies that focus both on calculating MIL and of relating MIL to RFC. This study is one of them and does not offer any unique conclusions to the body of theoretical knowledge. In fact, the findings in this study are not significantly different than the findings of Hanpachern and Madsen, indicating there is a common understanding of MIL and how it relates to RFC. Hanpachern's study noted the importance of demographic variables to MIL and RFC. Madsen showed that the demographic variables were less significant than Hanpachern originally thought, but that there was still utility in further study of MIL for use in organizational change efforts. This study does not contradict either of the previous works, but does seem to indicate there is much more work yet to do in the field of MIL to RFC correlation.

Maybe one lesson from these three studies is that the MIL calculation formula developed by Stevenson needs further refinement. Another lesson may be that the theory of margin is very difficult to quantitatively describe and attribute and thus is something best left to qualitative study. Perhaps this is why when Howard McClusky first presented the concept of margin in life in 1963, he did not propose a way to quantify it or even suggest that this was possible. The theory of margin makes sense and therefore is a good concept to use. Maybe that is enough.

Regarding the current study, the other findings do support the original research question. Without a doubt, one can safely state that Army leaders who want to successfully change their organizations should include spouses in their change effort. The evidence clearly suggests that Army spouses do provide an element of principal support for changes and influence soldiers' RFC. This principal support clearly contributes to successful organizational change interventions.

In addition to this knowledge, the study does indicate some techniques that appear to contribute to successful organizational change. These techniques are relatively simple and straightforward. They also represent actions that Army leaders are already doing in some cases. Both of these qualities make the recommendations useful for the intended audience. To come full circle, the techniques recommended here fully support Armenakis' five domains of the change message, which work together to create greater RFC and contribute to successful change interventions.<sup>90</sup>

Despite the encouraging findings, there is still more work to do in this field. Many of these recommendations for future research are rooted in some of the acknowledged limitations. First, this study should be repeated on a different population. Ideally this would be of a large organization that is undergoing a significant change. In such a case, survey participation could be made mandatory to ensure a wide demographic range throughout the organization. In a perfect world the study could observe two similar organizations with one acting as a control in which the leader does not deliberately communicate the change message to spouses. However, this is unlikely in a military setting since such experimentation may place lives and national security at risk.

Additionally, this study did not gain enough spouse survey data to make generalized conclusions about the full nature of organizational change from the spouse perspective. The findings represented here are not conclusive. Future research in this vein should take measures to

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<sup>90</sup> As a review, the five domains follow. Discrepancy is the means through which people in an organization recognize that there is a need for change. Discrepancy can be driven either by internal or external factors, but these factors must clearly identify to members of an organization that their status quo is unacceptable and they need to make changes to reach a different desired endstate. Appropriateness is the ability for people to recognize that the proposed change is the right change; in effect they must believe that a change will make them better and that it will fix the cause of the problems in the organization. Efficacy is the belief that the organization can make the change and this belief is strongly rooted in the people's confidence in their ability to successfully change. Valence is the perceived reward for changing. Simply put, people in an organization must understand that they will gain something through the change process. Valence answers the question, "What's in it for me?" from the perspective of all who are impacted by the proposed change. Principal support requires that key leaders in the organization, both formal and informal, demonstrate behaviors that support the change.

ensure greater spouse involvement. The most useful technique would be to survey married couples in a way that ensures each person takes the survey about the same event and to provide a means to link the surveys back together. This would guarantee adequate responses and would offer additional research possibilities into the nature of the relationships of married soldiers.

Finally, another interesting aspect of this research would be to see if these findings are applicable to civilian organizations. Since the Army historically has significant spouse involvement, there may be a tendency in the Army to automatically include spouses in change efforts. This tendency may not exist in a corporate environment. Because of this, a valid area of study would be to determine if communicating the change message to spouses would generate significant principal support for a civilian organization's change interventions. Given the current interest in work-family conflict and relations, such a systemic view of individual RFC seems a natural field for exploration.

At the end of the day, this study's conclusions offer much to Army leaders. Since the Army is constantly changing in response to organizational transformations, leadership transitions, and mission requirements, leaders must master organizational change techniques. While the need to generate principal support is only one aspect of organizational change, it is important to the overall effort. The fact remains that some leaders in the Army have harnessed the energy and power of Army spouses in successful organizational change with some very simple techniques. Other leaders and organizations would be wise to learn from their example.

## **APPENDIX 1: Survey to Determine Spousal Influence in Army Organizational Change Efforts**

Thank you for participating in this survey on organizational change in the US Army. Your responses will form the data needed to complete this research and to write my MMAS thesis.

Your participation is voluntary and your responses will remain completely confidential.

This survey should take approximately 15 minutes for you to complete.

For technical questions on the survey, please contact Ms. Maria Clark. maria.clark1@us.army.mil

This Survey has been approved by the Command and General Staff College, Quality Assurance Office. Survey control number is CGSC/QAO SCN 09-040.

## Change information

- I am a ...
  - ☐ Military member
  - ☐ Spouse of a military member

NOTE: The answer selected here directed the survey taker to the appropriate questions throughout the rest of the survey.

- Please select the nature of the organizational change that you best recall:
  - ☐ Army Transformation
  - ☐ Change of mission type (example Field Artillery unit deploying in an infantry role)
  - ☐ Change to the structure of the unit
  - ☐ Change of unit effectiveness
  - ☐ Change of unit morale
  - ☐ Other \_\_\_\_\_

- Are you married?
  - ☐ Yes
  - ☐ No

NOTE: If “Yes,” this branches to continue the survey. If “No,” this branches to the end of the survey.

## Unit size and type

- What was the size of the unit that underwent the change?
  - ☐ Company, Battery, Troop
  - ☐ Battalion, Squadron
  - ☐ Brigade
  - ☐ Division
  - ☐ Higher than division
  - ☐ Staff directorate
  - ☐ Other (please specify and include the number of personnel in the organization)  
\_\_\_\_\_

- What type of unit underwent the change?



- ☐ Maneuver, Fires and Effects
- ☐ Operations support
- ☐ Force sustainment
- ☐ Health services
- ☐ Other \_\_\_\_\_

- What was your rank at the time of the change? NOTE: Only soldiers answered this question.
  - ☐ Colonel
  - ☐ Lieutenant Colonel
  - ☐ Major
  - ☐ Captain
  - ☐ First Lieutenant
  - ☐ Second Lieutenant
  - ☐ Command Sergeant Major
  - ☐ Sergeant Major
  - ☐ First Sergeant
  - ☐ Master Sergeant
  - ☐ Sergeant First Class
  - ☐ Staff Sergeant
  - ☐ Sergeant
  - ☐ Corporal / Specialist
  - ☐ Private First Class / Private
  
- What was your spouse's rank at the time of the change? NOTE: Only Army spouses answered this question.
  - ☐ Colonel
  - ☐ Lieutenant Colonel
  - ☐ Major
  - ☐ Captain
  - ☐ First Lieutenant
  - ☐ Second Lieutenant
  - ☐ Command Sergeant Major
  - ☐ Sergeant Major
  - ☐ First Sergeant
  - ☐ Master Sergeant
  - ☐ Sergeant First Class
  - ☐ Staff Sergeant
  - ☐ Sergeant
  - ☐ Corporal / Specialist
  - ☐ Private First Class / Private
  
- What was your duty position during this change? NOTE: Only soldiers answered this question.
  - ☐ Commander / Director (Change leader)
  - ☐ Executive Officer
  - ☐ Operations Officer
  - ☐ Command Sergeant Major
  - ☐ First Sergeant
  - ☐ Other \_\_\_\_\_

- What was your spouse's duty position during this change? NOTE: Only Army spouses answered this question.
  - ( ) Commander / Director (Change leader)
  - ( ) Executive Officer
  - ( ) Operations Officer
  - ( ) Command Sergeant Major
  - ( ) First Sergeant
  - ( ) Other \_\_\_\_\_

## Leader Communications

Please indicate how strongly you agree or disagree with the following statements on **the techniques the change leader used** to communicate the change message:

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	N/A The Leader did not do this
The leader personally modeled the desired behaviors.						
The leader used written communications.						
The leader used bulletin boards.						
The leader conducted regular conversations with subordinates about the change.						
The leader regularly had conversations with superiors about the change.						
The leader regularly had conversations with leaders in the organization about the change.						
The leader executed different types of ceremonies than those that existed before the change effort.						
The leader managed information (such as statistics) from within the organization to measure the progress of the change.						
The leader managed information (such as statistics) from outside the organization to measure the progress of the change.						
The leader instituted changes in the organization's human resource practices (job assignments, training, personnel replacement).						

The leader instituted changes in the organization's award policies.						
The leader used negative consequences.						
The leader actively involved the service member's spouses in the change effort.						

## Spouse Involvement

Please indicate how strongly you agree or disagree with the following statements about how the change leader included service members' spouses in the change effort:

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	N/A The Leader did not do this
The leader attended meetings to answer spouses' questions.						
The leader provided spouses with written materials describing the change.						
The leader proactively explained why the change was necessary.						
The leader used informal meetings with spouses to share the change message.						
The leader established special meetings to directly discuss the change.						
The leader recognized that spouse support was essential to successfully implementing the change.						

## Leader Actions

Please indicate how strongly you agree or disagree with the following statements on how the change leader's actions **influenced your attitudes** about the organizational change:

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	N/A The Leader did not do this

The leader personally modeled the desired behaviors.						
The leader used written communications.						
The leader used bulletin boards.						
The leader conducted regular conversations with subordinates about the change.						
The leader regularly had conversations with superiors about the change.						
The leader regularly had conversations with leaders in the organization about the change.						
The leader executed different types of ceremonies than those that existed before the change effort.						
The leader managed information (such as statistics) from within the organization to measure the progress of the change.						
The leader managed information (such as statistics) from outside the organization to measure the progress of the change.						
The leader instituted changes in the organization's human resource practices (job assignments, training, personnel replacement).						
The leader instituted changes in the organization's award policies.						
The leader used negative consequences.						
The leader actively involved the service member's spouses in the change effort.						

## Spouse influence

Please indicate how strongly you agree or disagree with the following statements on how the following elements affected your attitude about the change. NOTE: Army spouses did not answer this series of questions.

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
My spouse was knowledgeable about the change.					
My spouse was comfortable with the change.					

My spouse thought that this was the right change for the organization.					
My spouse shared his or her opinions about the change with me.					
My spouse's comments to others about the change that I overheard influenced me.					
My spouse's feelings about the change leader influenced me.					
My spouse's confidence in the change leader influenced me.					
My spouse's involvement in the change process influenced me.					
My spouse's inclusion in the change process, regardless of how involved he or she was influenced me.					

## Impressions

Overall impressions from the organizational change that you are describing.

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I recognized there was a need for change in the organization.					
I supported the change.					
My spouse's attitude about the change affected my attitude about the change.					
This change effort was successful.					

## Leader Training

Prior to this experience, the training I received in the following domains prepared me well for the challenges of leading organizational change. NOTE: Army spouses did not answer this series of questions.

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	N/A
Military Schools						
Civilian Education						
Individual Study						

If there were 'other' contributors to your preparation for the challenges of leading organizational change, please describe them here: \_\_\_\_\_

## Margin in Life Questions

This section relates to how your work and family obligations affect your attitude. Please complete the phrases below with one of the selections on the right:

	Takes a lot of my energy - it physically or mentally drains - a load on my shoulders	Takes some of my energy - it somewhat drains me - somewhat of a load on my shoulders	Neither takes energy nor provides joy, pleasure, strength, or richness for me.	Provides or creates some joy, pleasure, strength, or richness for me - gives me some energy/power in life.	Provides or creates a lot of joy, pleasure, strength, or richness for me - gives me energy/power in my life.
My job...					
Balancing my work and family...					
My physical health...					
My mental health...					
My relationship with my boss...					
My social relationship in the workplace...					
My current job knowledge and skills...					
The demands of my job...					
My commitment to the Army...					
My family...					

### Spouse Invitation

- An important part of this survey requires gathering data from Army spouses. Would you be willing to forward this link to your spouse so he or she can also participate?

( ) Yes

( ) No

If you answered “Yes,” please copy and paste this link and email it to your spouse. Your extra effort to support this research is appreciated.

<https://cgsc2.leavenworth.army.mil/inquisite/surveys/6PWJAS>

NOTE: Army spouses did not answer this series of questions.

Thank you very much for your time in completing this survey. If you would like to see the results of this research, please provide your email address in the space provided below:

\_\_\_\_\_.

## **APPENDIX 2: Pearson Correlation for MIL Values**



	I supported the change.	My job...	Balancing my work and family...	My physical health...	My mental health...	My relationship with my boss...	My social relationship in the workplace...	My current job knowledge and skills...	The demands of my job...	My commitment to the Army...	My family...
I supported the change.	1	-.205	-.277	-.094	.128	-.101	-.032	.038	-.105	-.150	-.019
		.157	.054	.521	.382	.489	.825	.797	.471	.305	.900
	49	49	49	49	49	49	49	49	49	49	49
My job...		1	.476	.360	.368	.509	.362	.271	.612	.541	.230
			.000	.010	.008	.000	.010	.057	.000	.000	.108
		50	50	50	50	50	50	50	50	50	50
Balancing my work and family...			1	.253	.316	.382	.364	.209	.294	.489	.427
				.076	.025	.006	.009	.145	.038	.000	.002
			50	50	50	50	50	50	50	50	50
My physical health...				1	.700	.550	.540	.474	.302	.300	.427
					.000	.000	.000	.001	.033	.034	.002
				50	50	50	50	50	50	50	50
My mental health...					1	.450	.647	.442	.246	.226	.527
						.001	.000	.001	.085	.115	.000
					50	50	50	50	50	50	50
My relationship with my boss...						1	.559	.439	.522	.420	.366
							.000	.001	.000	.002	.009
						50	50	50	50	50	50
My social relationship in the workplace...							1	.630	.349	.298	.546
								.000	.013	.036	.000
							50	50	50	50	50
My current job knowledge and skills...								1	.434	.454	.638
									.002	.001	.000
								50	50	50	50
The demands of my job...									1	.565	.234
										.000	.103
									50	50	50
My commitment to the Army...										1	.477
											.000
										50	50
My family...											1
											50

\*\*. Correlation is significant at the 0.01 level (2-tailed)

\*. Correlation is significant at the 0.05 level (2-tailed).

### **APPENDIX 3: Pearson Correlation for Change Variables and Selected MIL Variables**

	The leader recognized that spouse support was essential to successfully implementing the change.	The leader actively involved the service member's spouses in the change effort.	My spouse was knowledgeable about the change.	My spouse thought that this was the right change for the organization.	My spouse was comfortable with the change.	My spouse shared his or her opinions about the change with me.	My spouse's comments to others about the change that I overheard influenced me.	My spouse's feelings about the change leader influenced me.	My spouse's confidence in the change leader influenced me.	My spouse's involvement in the change process influenced me.	My spouse's inclusion in the change process, regardless of how involved he or she was influenced me.	My spouse's attitude about the change affected my attitude about the change.	I recognized there was a need for change in the organization.	I supported the change.	This change effort was successful.	Balancing my work and family...	My job...	The demands of my job...	My commitment to the Army...	My family...
The leader recognized that spouse support was essential to successfully implementing the change.	1	.631	.386	.339	.242	.268	.140	.263	.255	.307	.410	.243	.201	.199	.310	.095	-.013	-.077	-.148	-.005
		.000	.007	.019	.097	.065	.344	.071	.083	.034	.004	.089	.161	.170	.029	.512	.931	.597	.304	.974
	50	47	48	48	48	48	48	48	47	48	48	50	50	49	50	50	50	50	50	50
The leader actively involved the service member's spouses in the change effort.	1	.531	.396	.375	.182	.035	.060	.152	.151	.331	.008	.199	.280	.577	.140	-.028	-.008	.035	.027	
		.000	.007	.010	.226	.817	.690	.318	.318	.025	.955	.181	.059	.000	.348	.852	.958	.817	.855	
	47	46	46	46	46	46	46	46	45	46	47	47	46	47	47	47	47	47	47	47
My spouse was knowledgeable about the change.	1	.519	.702	.252	.025	.062	.076	.027	.167	-.033	.226	.327	.601	-.209	-.238	-.178	-.033	-.164		
		.000	.000	.084	.866	.677	.611	.853	.256	.826	.123	.025	.000	.154	.104	.226	.822	.266		
	48	48	48	48	48	48	48	47	48	48	48	48	47	48	48	48	48	48	48	48
My spouse thought that this was the right change for the organization.	1	.660	.113	.162	.308	.267	.253	.322	.133	.342	.527	.490	.000	-.035	.004	.266				
		.000	.444	.272	.033	.069	.083	.026	.367	.017	.000	.000	1.000	.108	.464	.815	.980	.068		
	48	48	48	48	48	47	48	48	48	48	48	48	47	48	48	48	48	48	48	48
My spouse was comfortable with the change.	1	.082	-.053	.046	.121	.119	.174	.062	.234	.451	.564	-.291	-.248	-.146	-.031	.079				
		.581	.720	.754	.417	.421	.236	.676	.109	.001	.000	.045	.089	.323	.833	.592				
	48	48	48	48	47	48	48	48	48	47	48	48	48	48	48	48	48	48	48	48
My spouse shared his or her opinions about the change with me.	1	.331	.436	.378	.212	.423	.448	.205	-.051	-.100	.090	.077	-.104	.054	-.045					
		.022	.002	.009	.147	.003	.001	.161	.735	.498	.543	.605	.481	.716	.762					
	48	48	48	47	48	48	48	48	47	48	48	48	48	48	48	48	48	48	48	48
My spouse's comments to others about the change that I overheard influenced me.	1	.714	.605	.653	.635	.565	.045	-.185	-.006	.000	.217	.157	.153	.030						
		.000	.000	.000	.000	.000	.760	.213	.970	1.000	.139	.287	.299	.838						
	48	48	47	48	48	48	48	47	48	48	48	48	48	48	48	48	48	48	48	48
My spouse's feelings about the change leader influenced me.	1	.855	.599	.651	.621	.155	.061	.028	.108	.261	.163	.022	-.026							
		.000	.000	.000	.000	.292	.682	.848	.465	.074	.269	.880	.859							
	48	47	48	48	48	48	47	48	48	48	48	48	48	48	48	48	48	48	48	48
My spouse's confidence in the change leader influenced me.	1	.722	.721	.612	.229	.184	.086	-.013	.194	.108	.043	-.085								
		.000	.000	.000	.121	.216	.565	.932	.191	.469	.775	.571								
	47	47	47	47	47	47	47	47	47	47	47	47	47	47	47	47	47	47	47	47

My spouse's involvement in the change process influenced me.										1	.821**	.578*	.286*	.252	.254	-.058	.229	.249	.166	.010
											.000	.000	.048	.087	.082	.695	.117	.087	.259	.945
									48		48	48	48	47	48	48	48	48	48	48
My spouse's inclusion in the change process, regardless of how involved he or she was influenced me.											1	.506*	.128	.106	.250	.036	.244	.161	.254	.003
												.000	.385	.477	.087	.806	.095	.274	.081	.985
											48	48	48	47	48	48	48	48	48	48
My spouse's attitude about the change affected my attitude about the change.												1	.178	.074	-.034	.027	.142	.103	.043	.087
												.217	.178	.615	.815	.851	.325	.475	.769	.546
												50	50	49	50	50	50	50	50	50
I recognized there was a need for change in the organization.												1	.738**	.439	-.148	-.300*	-.203	-.218	-.018	
													.000	.001	.304	.034	.158	.128	.901	
												50	49	50	50	50	50	50	50	50
I supported the change.													1	.676*	-.277	-.205	-.105	-.150	-.019	
														.000	.054	.157	.471	.305	.900	
													49	49	49	49	49	49	49	49
This change effort was successful.														1	-.275	.113	.062	-.008	-.113	
															.053	.436	.669	.957	.436	
														50	50	50	50	50	50	50
Balancing my work and family...														1	.476*	.294	.489	.427		
															.000	.038	.000	.002		
														50	50	50	50	50	50	50
My job...															1	.612*	.541*	.230		
																.000	.000	.108		
															50	50	50	50	50	50
The demands of my job...																1	.565*	.234		
																	.000	.103		
																50	50	50	50	50
My commitment to the Army...																	1	.477*		
																		.000		
																	50	50	50	50
My family...																				1
																				50

\*\* . Correlation is significant at the 0.01 level (2-tailed)

\*. Correlation is significant at the 0.05 level (2-tailed).

## **APPENDIX 4: Results of Spouse Survey**

## Summary of Spouse Survey Responses

Question	Respondent 1	Respondent 2	Respondent 3	Respondent 4
Please select the nature of the organizational change that you best recall:	Other: FRG changes	Change of unit morale	Army Transformation	Change of mission type
What was the size of the unit that underwent the change?	Battalion, Squadron	Company, Battery, Troop	Division	Battalion, Squadron
What was your spouse's rank at the time of the change?	Captain	Captain	First Lieutenant	Captain
What was your spouse's duty position during this change?	Commander / Director (Change leader)	Commander / Director (Change leader)	Operations Officer	Commander / Director (Change leader)
The leader attended meetings to answer spouses' questions.	Agree	Strongly Agree	Agree	Strongly Agree
The leader provided spouses with written materials describing the change.	N/A The leader did not do this	Strongly Agree	Agree	Strongly Agree
The leader proactively explained why the change was necessary.	N/A The leader did not do this	Strongly Agree	Agree	Strongly Agree
The leader used informal meetings with spouses to share the change message.	Agree	Strongly Agree	Agree	Strongly Agree
The leader established special meetings to directly discuss the change.	Agree	Strongly Agree	Agree	Strongly Agree
The leader recognized that spouse support was essential to successfully implementing the change.	Strongly Agree	Strongly Agree	Agree	Strongly Disagree
The leader actively involved the service member's spouses in the change effort.	Agree	Strongly Agree	Agree	Strongly Agree
I recognized there was a need for change in the organization.	Neutral	Strongly Agree	Strongly Agree	Strongly Agree
I supported the change.	Strongly Agree	Strongly Agree	Agree	Strongly Agree
My spouse's attitude about the change affected my attitude about the change.	Disagree	Strongly Agree	Strongly Agree	Strongly Agree
This change effort was successful.	Strongly Disagree	Strongly Agree	Strongly Agree	Strongly Agree

## **APPENDIX 5: Pearson Correlation of Leader Techniques for Communicating the Change Message**

	The leader actively involved the service member's spouses in the change effort.	The leader attended meetings to answer spouses' questions.	The leader provided spouses with written materials describing the change.	The leader proactively explained why the change was necessary.	The leader used informal meetings with spouses to share the change message.	The leader established special meetings to directly discuss the change.	The leader recognized that spouse support was essential to successfully implementing the change.	My spouse thought that this was the right change for the organization.	I recognized there was a need for change in the organization.	I supported the change.	My spouse's attitude about the change affected my attitude about the change.	This change effort was successful.
The leader actively involved the service member's spouses in the change effort.	1 49	.625 49 .000	.658 49 .000	.629 49 .000	.586 49 .000	.367 48 .010	.566 49 .000	.290 47 .048	.073 49 .618	.245 48 .093	.153 49 .295	.472 49 .001
The leader attended meetings to answer spouses' questions.		1 50 .000	.750 50 .000	.763 50 .000	.776 50 .000	.653 49 .000	.697 50 .000	.345 48 .016	.088 50 .545	.091 49 .532	.183 50 .203	.291 50 .041
The leader provided spouses with written materials describing the change.			1 50 .000	.731 50 .000	.573 49 .000	.665 50 .000	.672 48 .006	.392 50 .987	-.002 49 .404	.122 50 .147	.208 50 .147	.394 50 .005
The leader proactively explained why the change was necessary.				1 50 .000	.547 50 .000	.561 49 .000	.659 50 .000	.382 48 .007	.052 50 .721	.211 49 .146	.029 50 .842	.388 50 .005
The leader used informal meetings with spouses to share the change message.					1 50 .000	.612 49 .000	.591 50 .000	.372 48 .009	.166 50 .250	.180 49 .215	.211 50 .140	.341 50 .015
The leader established special meetings to directly discuss the change.						1 49 .000	.554 49 .000	.299 47 .041	.054 49 .715	.057 49 .698	.320 49 .025	.157 49 .281
The leader recognized that spouse support was essential to successfully implementing the change.							1 50 .000	.339 48 .019	.201 50 .161	.199 49 .170	.243 50 .089	.310 50 .029
My spouse thought that this was the right change for the organization.								1 48 .000	.342 48 .017	.527 47 .000	.133 48 .367	.490 48 .000
I recognized there was a need for change in the organization.									1 50 .000	.738 49 .000	.178 50 .217	.439 50 .001
I supported the change.										1 49 .000	.074 49 .615	.676 49 .000
My spouse's attitude about the change affected my attitude about the change.											1 50 .000	-.034 50 .815
This change effort was successful.												1 50

\*\*. Correlation is significant at the 0.01 level (2-tailed)

\*. Correlation is significant at the 0.05 level (2-tailed)



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